
World Cup Brand Winners and Losers: Post Tournament Preliminary Analysis

The 2014 World Cup is in the books with another German victory – and while fans and players get the benefit of rejoicing (or mourning) the second that stoppage time winds down, the marketers who paid for the whole foofaraw must spend additional time combing through data to determine if their investments paid off. Networked Insights has compiled preliminary data on brands that sponsored the World Cup (and some of their key competitors) to assess the winners and losers.

Overall Value to Sponsors

There are many ways to measure sponsorship value; a common method Networked Insights employs is to measure the volume of general purchase intent conversation an audience displays before and after they are exposed to a particular event. The findings from World Cup 2014 may not be the best news for sponsors.

Purchase intent conversation for World Cup fans *decreased* 14% during the tournament from pre-tournament levels – compared with a baseline audience in which purchase intent conversation remained roughly level (+0.6%). Networked Insights conducted similar research during the 2014 NCAA Division-I Men's Basketball Tournament (aka, March Madness) and found that purchase intent conversation increased 3% compared with a baseline that also increased (+1.7%).

"Many things can influence purchase intent," said Rick Miller, vice president of strategic insights at Networked Insights. "One thing March Madness sponsors enjoy that World Cup sponsors do not is a robust inventory of in-game advertising opportunities. TV commercials provide engaging messaging during intervals when consumers are likely to tweet or otherwise engage with brands via social media."

Does this mean World Cup sponsorship is a bad idea? Not necessarily, but its value becomes harder to measure.

Official Sponsors

Budweiser dominated the tournament in terms of online engagement with World Cup fans. The "Man of the Match" campaign helped increase brand awareness conversation among fans by over 1,000%. It also was the only brand to see a notable increase in purchase intent conversation among fans. Hyundai and Castrol rounded out the medal winners in brand awareness among official World Cup Sponsors.

(See table next page)

Changes in Brand Awareness for World Cup Sponsors Among World Cup Fans

<u>Brand</u>	<u>Category</u>	<u>Change</u>
Budweiser (AmBev)	Food & Beverage	1019.1%
Hyundai	Auto	303.7%
Castrol	Other	295.2%
adidas	Sports Apparel	121.4%
Kia	Auto	74.4%
Coca Cola	Food & Beverage	48.6%
Powerade	Food & Beverage	38.9%
Continental	Other	-18.3%
Emirates	Airline	-18.3%
Visa	Financial Services	-21.3%
McDonalds	Restaurant	-31.4%
Sony	Electronics	-45.1%

Source: Networked Insights World Cup Fan audience, May 1st 2014 - July 13th 2014; N = 108,330 conversations

Category View: Sponsors and Non-Sponsors

The comeback story for the 2014 World Cup has to be adidas. Leading up to the opening ceremony and through the first week of the tournament, Nike was dominating adidas in overall brand mentions and in lift in brand mentions. Nike's heavy investment in broadband video spots, which featured their roster of star players – including Ronaldo, Neymar and Rooney – and were released before the tournament started gave them an early lead in the category. But adidas stormed back.

"A combination of a strong TV commercial – 'House Match' featuring Beckham and Zidane – incited strong organic consumer conversation and an abundance of YouTube shares," said Sabrina Fruehauf, an analyst at Networked Insights. "Additionally, because the World Cup final was played by two adidas-sponsored teams, adidas' #allin social campaign finished strong." adidas increased brand mentions by 121.4% during the tournament and ended with 0.218% total share of voice among World Cup fans compared with Nike's 0.168%.

While adidas successfully defended its futbol turf against Nike, non-sponsor Puma managed to see the most growth in brand conversation among World Cup fans during the tournament. "Puma's timely announcement regarding Arsenal, in the Premier League, caused a spike in brand interest but by share-of-voice measures the brand still lags adidas and Nike," said Ted Collins, analyst at Networked Insights.

In the auto category, the Kia and Hyundai official sponsors appeared to get their money's worth and defended their investment from non-sponsor interlopers. Hyundai grew brand awareness 303% among World Cup fans with its #becausefutbol campaign while Kia awareness increased 74% among the same audience on the strength of its Adriana Lima TV spots. None of the other brands in the category gained traction with the World Cup fan base during the tournament.

Not all sponsors fared so well. McDonald's GOL campaign – which featured some packaging and mobile-device [wizardry](#) – did not catalyze much association. Brand awareness for the chain among World Cup fans slipped 31.4% during the tournament.

Changes in Brand Awareness Among Sports Apparel Brands, World Cup Fans

<u>Brand</u>	<u>Category</u>	<u>Change</u>	<u>Tournament SOV</u>
Puma	Sports Apparel	172.6%	0.036%
adidas	Sports Apparel	121.4%	0.218%
Nike	Sports Apparel	-16.1%	0.168%
Under armour	Sports Apparel	-30.4%	0.002%
Reebok	Sports Apparel	-42.5%	0.001%

Source: Networked Insights World Cup Fan audience, May 1st 2014 - July 13th 2014; N = 142,690 conversations

Changes in Brand Awareness Among Food & Beverage Brands, World Cup Fans

<u>Brand</u>	<u>Category</u>	<u>Change</u>	<u>Tournament SOV</u>
Budweiser (AmBev)	Food & Beverage	1019.1%	0.070%
Coca Cola	Food & Beverage	48.6%	0.024%
Powerade	Food & Beverage	38.9%	0.002%
PepsiCo	Food & Beverage	6.8%	0.003%
Miller Coors	Food & Beverage	-24.4%	0.001%
Gatorade	Food & Beverage	-72.4%	0.004%

Source: Networked Insights World Cup Fan audience, May 1st 2014 - July 13th 2014; N = 29,290 conversations

Changes in Brand Awareness Among Auto Brands, World Cup Fans

<u>Brand</u>	<u>Category</u>	<u>Change</u>	<u>Tournament SOV</u>
Hyundai	Auto	303.7%	0.016%
Kia	Auto	74.4%	0.004%
Audi	Auto	-25.5%	0.011%
BMW	Auto	-31.5%	0.004%
Mercedes	Auto	-38.7%	0.005%
Ford	Auto	-38.9%	0.005%
VW	Auto	-49.1%	0.005%
Chrysler	Auto	-59.2%	0.000%

Source: Networked Insights World Cup Fan audience, May 1st 2014 - July 13th 2014; N = 20,150 conversations

Honorable Mention: Castrol Index

Motor oil company Castrol captivated fans with the "[Castrol Index](#)" – an interactive rating systems that evaluates and ranks players based on very specific actions on the field. Castrol increased brand awareness among World Cup fans by 295% during the course of the tournament, behind only Budweiser and Hyundai.

"Leveraging digital campaigns to extend big-ticket event sponsorship is a complex art form," said Rick Miller, vice president of strategic insights at Networked Insights. "Castrol's online, stats-driven rating system fascinated players while McDonald's packaging-driven approach didn't cross the chasm. The nuances in user experience make big differences."